

Governor of Arizona
Janet Napolitano

STATE OF ARIZONA
SCHOOL FACILITIES BOARD

Executive Director
John Arnold

FY 2008 CAPITAL PLAN PACKET

Due by September 1, 2007

2008 Capital Plan Packet Instructions

2008 Capital Plan Submittal Form

District Information

Student Population Update

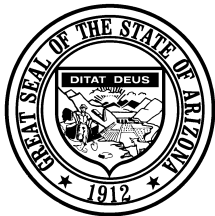
To be
completed by
ALL districts,
even if no
request for new
construction

New Construction Project Request

Local Funds Construction Report

Residential Development Update

Residential Development (continued)



STATE OF ARIZONA SCHOOL FACILITIES BOARD

2008 CAPITAL PLAN PACKET INSTRUCTIONS

Per A.R.S. §15-2041 C., districts are required to submit a capital plan to the School Facilities Board by September 1, and request monies from the new school facilities fund if the plan indicates a need for a new school or addition to an existing school within the next four years (through FY 2011-12), or a need for land within the next ten years (through FY 2017-18).

NOTE: If the district is not requesting new construction, the only sections that need to be completed are “District Information”, “Student Population Update”, and “2008 Capital Plan Submittal Form”.

2008 Capital Plan Submittal Form

The 2008 Capital Plan Submittal Form provides a format to document that the Plan has been approved by the district’s governing board. This form requires a signature; please mail it to:

School Facilities Board
Attention: Amber Peterson
1700 West Washington, Suite 230
Phoenix, Arizona 85007

All of the remaining forms must be submitted **via e-mail**.

Note: The following six forms are all included in one Excel file. Please open the file and refer to the bottom of your computer screen for the six different tabs.

Only the first two tabs need to be completed if the district is not requesting new construction funds.

District Information – to be completed even if no new construction request

Please provide the contact information requested at the top of the page. Only complete the Master Plan and Feeder District sections if applicable to your district.

Student Population Update – to be completed even if no new construction request

➔ Methodology - description of the methodology used by the district in developing the ADM/enrollment forecasts. Examples could include cohort survival, regression analysis, or other types of historical trend analysis.

- ➔ Grade Level – Write in the grade levels served for elementary and middle school levels – i.e. E = K-5, K-6, or K-8 and M = 6-8 or 7-8. Grade levels need to match the grade levels for which the district is requesting new space.
- ➔ ADM Forecast through FY 2015-16 – ADM is 100th day attending ADM (**FY 2007-08 will also need to be projected** since the 100th day has not occurred yet – SFB staff may request updated numbers from your district prior to taking our recommendation to our Board). **Kindergartners are counted as one-half** whether or not the district offers full-day kindergarten classes.
- ➔ Enrollment Forecast through FY 2015-16 – For FY 2006-07, please provide your district's enrollment as of the last day of school. For FY 2007-08, provide the enrollment number as of the first day of school. For all other years, provide projected enrollment as of October 1st.
- ➔ Tuitioned Students – Indicate number of high school students that are tuitioned in or tuitioned out, and to or from which district.

New Construction Project Request

The School Facilities Board completed its FY 07 Capital Plan cycle on June 7, 2007. If your district received conceptual approval for a project in the last cycle, the information has been pre-printed on this form for your convenience. Conceptually-approved projects have not yet been approved for funding, and they **must be re-analyzed each year to determine their eligibility**. If you are requesting changes to these projects, please **bold** or type the changes in a **different color font**. This form should not include projects that have already been approved for funding.

If you are requesting new projects that were not conceptually approved last year, please provide all of the information below:

- ➔ Project Description - a brief description of the project - i.e. - new elementary school, new high school, additional square footage at an existing school site, etc.
- ➔ Project Number – This will be pre-printed if a project number has already been assigned. Otherwise, leave blank.
- ➔ Grade Level - i.e. – K-5, K-6, 6-8, 7-8, K-8, 9-12, etc.
- ➔ Number of Students – This number only drives the square footage and budget numbers. The actual statutory capacity of project would be higher than this number.
- ➔ Projected Opening – when the project would likely open - i.e. - Fall 2010.
- ➔ Land Need – Indicate whether the land is already owned by the district, will be donated by the developer, or requires lease or purchase. If lease or purchase is required, districts may obtain land applications by contacting Kerry Campbell at kcampbell@azsfb.gov or 602-542-6504.
- ➔ Land Status – Indicate where the district is in the process of obtaining a site.

Districts may also request cancellation of previously-approved new construction projects and retirement of existing buildings in their Capital Plan.

Local Funds Construction Report

List all district-funded construction projects, either in progress or planned, that will increase square footage in the district. Since FY 03, locally-funded square footage is analyzed by SFB staff to determine if any of it should be included in the district's gross square footage as required in A.R.S. §15-2011 E.6.

Information to be provided for each locally funded project includes:

- Project Description - a brief description of the project - i.e. - new school, additional classrooms, etc.
- Grade Configuration – grade level to be served by new space.
- Funding Source - local funds include Class A bonds, capital outlay override funds, school capital equity funds, etc. If the funding source is B Bonds, capital outlay override, or impact aid revenue, footnote the date of voter approval for authorization.
- Estimated Completion Date - the month and year that the completed project is expected to be in use.
- Replacement Space? – Indicate whether or not the project is replacement space. If Yes, footnote the buildings that are being replaced.
- Gross Square Footage - total gross square footage as measured from exterior wall to exterior wall.
- Excludable Square Footage – amount of gross square footage used solely for district administration, storage of vehicles, etc. - per A.R.S. §15-2011 E.4. Footnote the reason for its exclusion.
- Net Square Footage - gross square footage less excludable square footage.

Residential Development Update

If your district is requesting new construction based on residential development, please complete the Residential Development Update form.

- Development Name – name of development
- Location – indicate which corner of which major crossroads the development is near – i.e. NW corner of 1st Street and 2nd Avenue. District-wide maps can be mailed or e-mailed to us, if available.
- Builder – There may be multiple builders within one development
- Contact Person – name
- Phone Number or E-mail Address – in case SFB staff needs to contact builder
- Projected Number of Newly-Occupied Housing Units (Closings) by Fiscal Year – projected number of newly-occupied homes by development, by builder, by fiscal year.
Please note that there is a column for last year; this number should be actual. The remaining years will require projections.

For some districts, this will be a long list. Keep it all on one spreadsheet; just add rows if necessary.

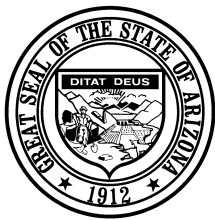
Residential Development Update (continued)

Please fill in the chart to indicate what student yield factors were used by the district to derive the ADM projections. If the district does not have precise yield factors, please give

best estimates. The grade levels listed should match those listed on your Student Population Update form.

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The Excel file is due to the School Facilities Board **September 1, 2007**. The Capital Plan Submittal Form may be mailed after September 1st, if the district's Governing Board is unable to approve the Plan before then, but the School Facilities Board will not consider the district's requests until this signed form is received. Please mail the Capital Plan Submittal Form to the address provided above, and e-mail the rest of the forms to apeterson@azsfb.gov. If you have any questions regarding the requested information, please call Amber Peterson at (602) 542-6736.



STATE OF ARIZONA SCHOOL FACILITIES BOARD

2008 CAPITAL PLAN SUBMITTAL FORM

Capital plans submitted by school districts in the state are required to have the approval of the school district's governing board (A.R.S. §15-2041 B). Please provide the following information with the 2008 capital plan submitted to the School Facilities Board.

School District:	
Contact Person:	
Title:	
Telephone Number:	
Fax Number:	
E-mail Address:	

This 2008 Capital Plan submittal was approved by the Governing Board of the _____ School District on _____, and I, _____, am authorized to transmit this document to the School Facilities Board on behalf of the District.

Signature

Title

Printed Name

When this page is signed, mail to:
School Facilities Board
Attention: Amber Peterson
1700 West Washington, Suite 230
Phoenix, AZ 85007

The remaining forms should be e-mailed as per the instructions.